

# **Joint Officer Management**

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## ***Joint Qualification System (JQS) - 101***

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**July 2007**

# OVERVIEW



- Brief History of Joint Officer Management (JOM)
- NDAA 2007 – A Turning Point
- The Joint Qualification System (JQS)
- The Way Ahead

## • Original Objectives of Goldwater-Nichols Act (GNA)

- Enhance joint warfighting capabilities.
- Ensure that general and flag officers are well versed in joint matters.
- Increase the QUALITY of officers assigned to joint commands and organizations.
- Create a pool of officers having both EXPERIENCE and EDUCATION in joint matters.
- Increase the STABILITY of officers in joint assignments.

### ***Major Provisions***

- ✓ SecDef defines “Joint Duty Assignment” (JDA)
- ✓ Establishes “Critical Positions” (Filled by JSOs)
- ✓ Minimum/Average Joint Duty Tour Length
- ✓ JPME Graduates to be assigned to JDA
- ✓ Promotion Objectives
- ✓ Joint Duty Assignment prerequisite for O-7
- ✓ Mandates Joint Specialty Qualification for Assignment as VCJCS or COCOM CDR
- ✓ Mandates G/FO Joint Duty for CJCS, Service Chiefs, and COCOM CDRs

# ***GNA: Joint Credit***



- **Time-phased**

**None**  
(0-10 mos)

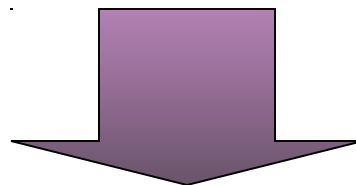
**Cumulative**  
(10 mos-3 yrs)  
(JTF: 3 MOS-3 YRS)

**Full**  
(3 yrs-FG)  
(2 YRS GFO)

**JSO**  
JPME+  
(3 yrs-FG)  
(2 YRS GFO)

## **1986 Cold-War management model**

*Garrison Force*



*Robust Force Levels*

## **DESERT SHIELD/DESERT STORM**

## **Transition to an Expeditionary Force**





Colonels and above from MNF-I's Strategy, Plans, and Assessment section

- **JPME Phase I graduate**
- **HQs MNF-I, Future Ops Chief and Chief of Plans (19 months)**
  - Boss was a USAF Maj Gen; deputy was a British Brigadier
  - Supervised USN, USAF, USMC, British Army, Australian Army and Air Force, Bulgarian Army, and Italian Army officers
- **Bilateral Affairs Officer, Bosnia (12 months)**
  - Rated by USAF officer at EUCOM; reported to the US Ambassador; was in direct support of COMSFOR; and had a USMC and three USAF subordinates



- **USMC Liaison to USJFCOM Warfighting Lab (24+ months)**
  - A “Service” billet; not authorized to be on the Joint Duty Assignment List (JDAL) per statute and policy.
    - **FITREP:** *He is performing the same billet tasks as other field-grade officers in the Joint Urban Operations Office who are receiving joint credit*
- **CO, Security Task Force, USMARCENT, Iraq (12 months)**
- **JPME PH II Graduate**

Not eligible for JOINT CREDIT under current statutes without multiple waivers

**Multi-level Joint Qualification System will recognize all joint experiences, training, and education**



## ***NDA 2007***

**First Significant Changes in 20 Years!**

**Directed creation of multi-level joint Qualification system**

## ***NDA 2005***

**Directed a Strategic Plan for JOM & JPME**

**linking Joint Officer development to the missions & goals of DoD**

## ***NDA 2002***

**Directed independent study of Joint Officer Management (JOM) & Joint Professional Military Education (JPME)**

# Remaining True to the Basic Tenets of GNA



- **Original Objectives of GNA**

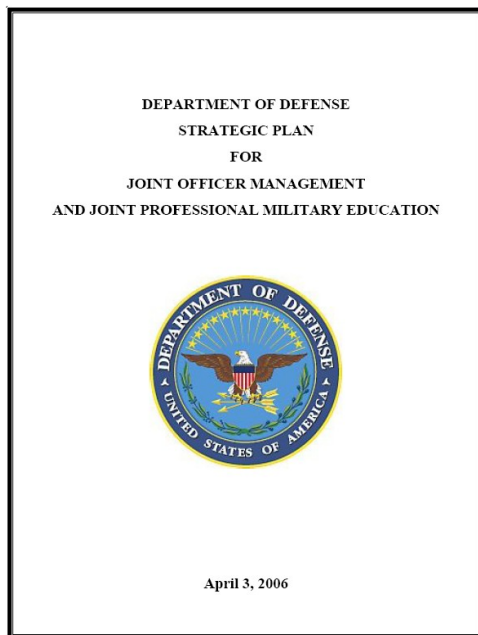
- Enhance joint warfighting capabilities.
- Ensure that general and flag officers are well versed in joint matters.
- Increase the quality of officers assigned to joint commands and organizations.
- Create a pool of officers having both experience and education in joint matters.
- Increase the stability of officers in joint assignments.

Enhance, Not Abandon, Goldwater-Nichols

***The Strategic Plan for JOM and JPME transforms JOM from its current static format to a more dynamic, flexible process capable of recognizing and tracking joint experiences.***

## **Objectives**

- Create a Joint Officer Management System responsive to the warfighter in multi-service, multinational, and interagency operations
- Produce fully qualified and inherently joint officers in sufficient numbers to meet mission requirements.
- Develop joint leaders for promotion to general/flag officer rank.
- Continue to assign high quality officers to joint assignments.





## §516 (b)

*The Secretary of Defense shall establish different levels of joint qualification, as well as the criteria for qualification at each level.*

*Each level shall, as a minimum, have both joint education criteria and joint experience criteria.*

*The purpose of establishing such qualification levels is to ensure a systematic, progressive, career-long development of officers in joint matters and to ensure that officers serving as general and flag officers have the requisite experience and education to be highly proficient in joint matters.*

# The JQS...



- Continues to require the Services to maintain the §664 tour length average for officers serving in JDAL positions
  - 36 months for O-6 & below
  - 24 months for general/flag officers
- Is NOT an “express lane” to joint qualification
- Continues to require general/flag officers to serve in a JDAL position in order to be eligible to become a COCOM commander or Service Chief



# Definition of Joint Matters



...matters related to the activities and interaction by multiple military

forces in operations conducted across domains such as land, sea, or air, in

space, or in the information environment, including matters relating to -

- (A) national military strategy;
- (B) strategic planning and contingency planning;
- (C) command and control of operations under unified command;
- (D) national security planning with other departments and agencies of the United States; and
- (E) combined operations with military forces of allied nations.

(2) In the context of joint matters, the term “multiple military forces” refers to

forces that involve participants from the armed forces and one or more of the following:

- (A) Other departments and agencies of the United States.
- (B) The military forces or agencies of other countries.
- (C) Non-governmental persons or entities.

# The Joint Qualification System

## TRADITIONAL PATH

*S-JDA (JDAL)*

- Statutory Tour Lengths
  - 36 month (O-6 & below)
  - 24 month (GFO)
- Tour Length Waivers Available
- JPME I & II / AJPME Required
  - JPME Waiver Available

Converts to Pts

Cum  
Credit

Full  
Credi  
t

## EXPERIENCE PATH

*E-JDA*

**LEVEL I**

+ 18 Points  
& JPME I

**LEVEL II**

+ 18 Points  
& JPME II/AJPME

**JOINT QUALIFIED OFFICER (JQO)  
[LEVEL III]**

GFO Full Joint Credit  
& CAPSTONE

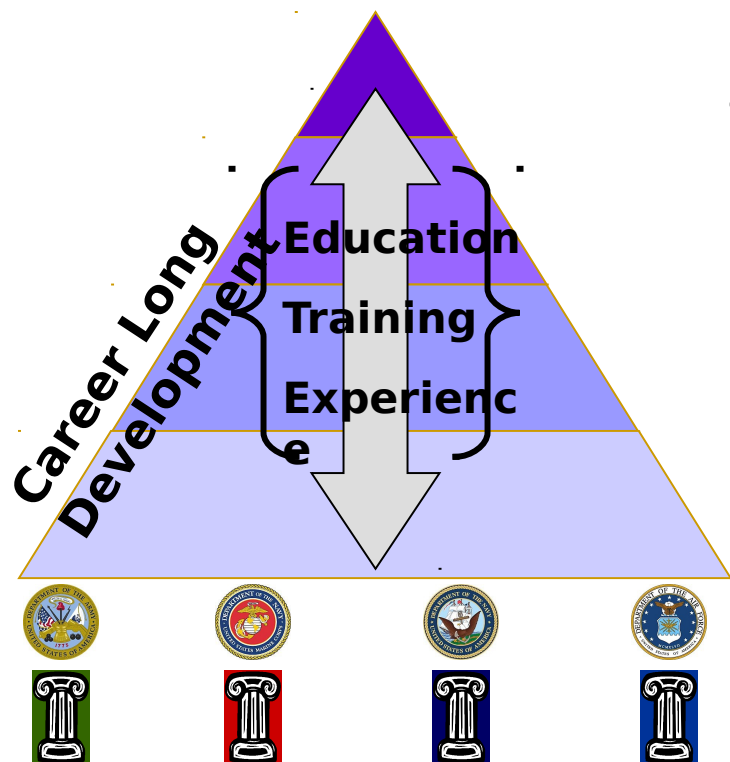
+ 24 Points  
& CAPSTONE

**LEVEL IV**

# Joint Qualification System (JQS)



*The Secretary of Defense shall establish different levels of joint qualification, as well as the criteria for qualification at each level.*



- Four-level system open to AC and PC

Level I -- Entry level; starting as an O-1

Level II -- Requires JPME I  
-- 18 points joint points (JPs)  
-- Certified by CJCS

Level III -- Requires JPME II or AJPME  
-- 18 JPs since award of Level II  
-- Certified by SecDef or USD  
-- "Joint Qualified Officer" = JSO

Level IV -- Only available to GFOs  
-- Requires CAPSTONE (AC only)  
-- Holds the Joint Qualified Officer designation  
-- 24 JPs from experience while assigned



<div>Joint Qualification Matrix</div> <div>LEVEL</div>	CRITERIA
I	a. Awarded upon joint certification of pre-commissioning <u>and</u> basic officer course completion. -- These courses provide learning objectives dealing with "Joint Introduction and Awareness". b. Junior Officers are focused on Service competencies. c. Qualification points begin to accrue following commissioning via opportune joint experiences, joint training, joint exercises, and other education.
II	a. Awarded upon completion of JPME I, accrual of 18 joint points, and certification by the CJCS. b. A minimum of 12 points must come from "Joint Experience" c. Additional points may be derived from joint experience, joint training, joint exercises, and other education
III	a. Awarded upon completion of JPME II or AJPME (Reserve Component officers), 18 joint points earned since certification as Level II, and certification by the Secretary of Defense or his designee. b. A minimum of 12 "Joint Experience" points must have accrued since award of Level II c. Additional points may be derived from joint training, joint exercises, and other education d. Formal designation: Joint Qualified Officer (JQO) e. Effective 30 Sep 2008, JQO required for appointment as an O-7 (AC Only)
	a. Awarded upon completion of CAPSTONE. previous designation as a IOO. accrual of 24

**Point Accrual Formula**

**JOINT QUALIFICATION LEVEL** = JOINT EDUCATION + **EXPERIENCE** Pts + **OTHER** Pts

Joint **EXPERIENCE** Points = Duration (Months) x Environment Factor\*

\*Combat: 3, Non-Combat: 2, Steady-state: 1

**OTHER** Points = Education + Training + Exercise

Education / Training = degree or certification related to "Joint Matters" [Pts TBD]

Exercise Points = Role [Participant (1pt), Planner (2pts), Leader (3pts)]

# ***Retroactive Joint Experience***



- Why retroactive?
  - Worth the extra effort to capture joint operational experience not accounted for under current ROE
  - Aids in transitioning the force
- What timeframe?
  - Capture experience back to 9-11 (11 Sep 01)
    - Applies to the Total Force
    - Based on joint experience guidelines (DoD policy & CJCS procedures)
  - Capture Reserve Component (RC) experience back to 1 Oct 86
    - Recognizes the lack of RC opportunities for joint credit
    - Levels the playing field—if Active Component officers were eligible, then RC should now be eligible (e.g. service on the Joint Staff)

Title 10 USC, §666...

*The Secretary of Defense shall establish personnel policies emphasizing education and experience in joint matters for reserve officers not on the active-duty list. Such policies shall, to the extent practicable for the reserve components, be similar to the policies provided by this chapter.*

- The Joint Qualification System...
  - Provides parity between the AC and RC for joint qualifications
  - Provides first viable program for recognizing RC officers for their contributions to joint operations

## **§619a-Joint Duty Requirement for Promotion to General/Flag Officer**



- An officer on the active-duty list may not be **appointed** to O-7 unless—
  - The officer has completed a full tour of duty in a joint duty assignment, and
  - For **appointments after September 30, 2008**, the officer has been “designated as a Joint Qualified Officer” [replaces “selected for the joint specialty “]
- Exceptions/Waivers by the SecDef granted on a case-by-case basis
  - When necessary for the good of the service
  - In the case of an officer whose proposed selection for promotion is based primarily upon scientific and technical qualifications for which joint requirements do not exist
  - In the case of—
    - a medical officer, dental officer, veterinary officer, medical service officer, nurse, or biomedical science officer; chaplain; or a judge advocate

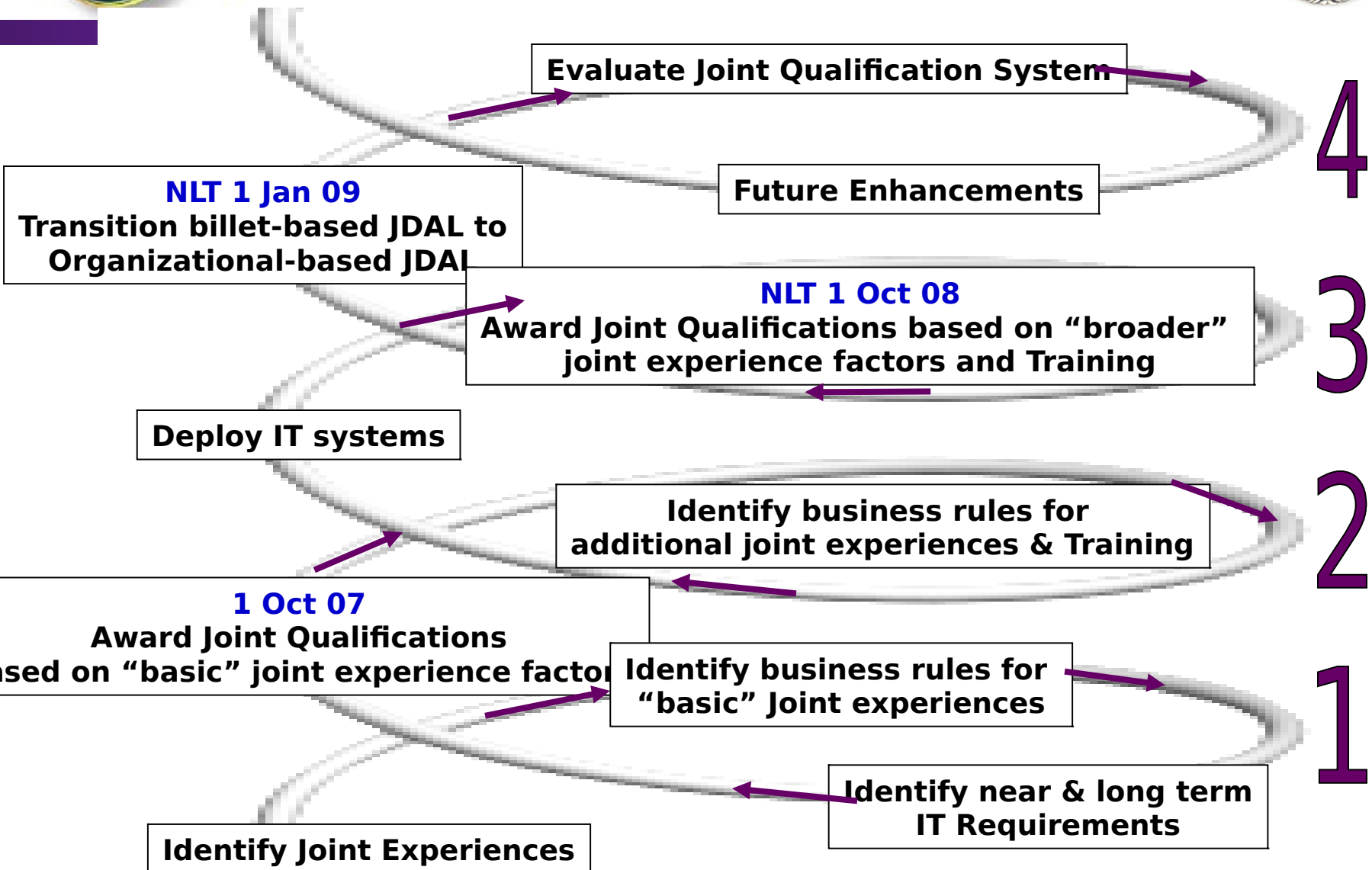
## ***§619a-Joint Duty Requirement for Promotion to General/Flag Officer cont'd***



- Impact on upcoming O-7 boards (with PDOP after 30 Sep 08)
  - JPME-JDA sequencing requirement lifted
  - Imperative to review/assess joint experiences under JQS and designate as JQO soonest
  - Service decision whether to allow records of officers not meeting the JDA and JQO standard to go before the promotion board
  - If officer not meeting the standard is selected then...
    - Waiver request(s) must be processed with the promotion board package



# Transition Spirals



- Publish overarching policies
- Develop and publish procedures
- Beta-test sampling of O-6 population
- Continuous improvement process—feedback loop to assess and refine Joint Qualification System
- To Be Done...
  - Finalize self-nomination web site
  - Disseminate additional JOM Fact Sheets
  - Full Reserve Component implementation plan (RA lead)

**Back -  
up**



- NDAA 2007 includes significant modifications to JOM statutes
  - Sec 519 Modified definitions of “Joint Matters” and “Joint Duty Assignment” (§668)
  - Sec 518 Limited application of 50%+1 rule to only National Defense University programs (§663)
  - Sec 517 Modified promotion policy objectives for joint officers (§662)
  - Sec 516 Provide for multi-level joint qualifications, Eliminate 800 Critical Billet Requirement, and Removes Sequencing Requirement (§661)
- Provisions go into effect 1 October 2007

## **Initiative:** Applicability of Joint Duty Assignments (50%+1 rule)

👉 50%+1 rule would only apply to a school within the National Defense

University; schools are further defined as...

- National War College
- Industrial College of the Armed Forces
- Joint Advanced Warfighting School
- Joint Forces Staff College

**Impact:** Balances needs of the Joint community and Services by providing greater assignment and education flexibility



## **Initiative:** Modification of Promotion Policy Objectives for Joint Officers

- Deletes the current promotion objective for JSOs
- Reduces promotion objectives to two categories:
  - Joint Staff = Service Headquarter average
  - Other Joint = Board average
- Encourages assignment to Joint Staff or other joint organizations

**Impact:** Promotes jointness as career-spanning vice an episodic

**Initiative:** Change 800 critical joint billet requirement to



Critical billets become less of a pawn in obtaining joint qualified officers

**Impact:** Multi-level Joint Qualification System empowers COCOM commanders to more accurately match joint education, training, and experience requirements to each billet based on mission requirements



## **Initiative:** Remove JPME-II and joint duty assignment sequencing requirement



- Establish equity between COS and non-COS officers
- Maximizes JPME-II attendance
- Improves flexibility in officer assignments

**Impact:** Emphasizes continuous, life-long joint learning

## **Initiative:** Modify Definition of Joint Matters

- Adds multi-national, interagency, and non-governmental

**Impact:** Reflects joint partners and expanded operational environment

## **Initiative:** Modify Definition of Joint Duty Assignment

- Deletes exclusion of an assignment within an officer's own military department

**Impact:** Recognizes all joint experiences; allows capture of joint capabilities; enables multi-level joint qualification system



# Office of the Secretary of Defense *Joint Officer Management?*



**DoD:** Provide the military forces needed to **Deter War** and **Protect the Security of the United States**

**NSS:** **Defend our Nation** against its enemies

- Strengthening joint operations

**NDS:** **Create favorable security** conditions around the world and to **continue to transform** how we think about security, formulate strategic objectives and **adapt to achieve success**

- Strategy requires a high quality joint force
- We remain committed to increasing levels of joint competency and capability

**NMS:** **Protect** the United States ...  
**Prevent** conflict ...  
**Prevail** against adversaries ...

**Joint Officer :**

The future Joint Force Leader is a fully qualified and inherently joint, critical thinker fighter!

**National Strategy Linked to Joint Warfighting**